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Patric Glassell, chief growth officer of Kwanti, speaks during the Technology Tools for Today (T3) Conference on Thursday, March 14, 2026, in New Orleans. *Rob Burgess/Financial Planning*

The T3 2026 announcements that wealth managers should know
By Rob Burgess
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As is by now tradition, several wealth technology firms chose the Technology Tools for Today (T3) Conference to reveal current and upcoming upgrades to their platforms.

The use of artificial intelligence tools — especially note-takers — has skyrocketed this year in the wealth management industry. So, it shouldn't be any surprise that many of these new and proposed features, which were on display in New Orleans last week, all incorporated the technology to one degree or another.

Libretto reveals AI data entry tool
Though it has a relatively small user base, upstart financial planning software company Libretto once again took center stage as one of the highest-rated companies in the annual T3/Inside Information Software Survey, with an average customer satisfaction ranking of 8.54 out of 10.

Libretto also used the occasion to debut its new AI-automated data entry tool, which creates new strategies using uploaded client data files.

In an interview with Financial Planning, CEO Jeff Coyle said this enhancement is meant to streamline workflows and reduce the barriers to giving even better advice.

"You can take a handful of unstructured documents or an existing financial plan loaded into Libretto, and in a couple of minutes, the [client] will have a plan," he said. "What could have taken a couple of hours before now takes literally a couple of minutes."

Jorge Tarraso, head of client experience, said Libretto's aim was to remove friction, but not to replace the advisor's judgment.

"It's helping to make the onboarding easier by refining the plan without removing the advice," he said.

Syntax Data debuts AI agent Saidee
Financial analytics company Syntax Data launched a new feature it calls Saidee, which is its new AI agent and portfolio development application.

The upgrade is meant to facilitate the creation, management and marketing of customized, rules-based portfolios and indices.

In an interview with Financial Planning, CEO Patrick Shaddow said the company created this tool in an effort to make the process of communicating with their platform and data easier.

"We made it more or less like a questionnaire where anyone with any type of experience could go through our platform, select a bunch of different options and create a rules-based and transparent index," he said. "Now rules-based and transparent index creation is a process ... a methodology."

Sean Sandys, chief technology officer, said Syntax Data was using a large language model (LLM) to give users a natural way to engage.

"It's an institutional-level process at a level of accessibility and ease that any RIA can get to," he said.

Advyzon also going agentic
Though all-in-one platform Advyzon is still preparing the rollout of its new AI

features, executives spoke both on and off stage and about what is soon to come.

Starting in April, Advyzon will begin deploying monthly AI upgrades to its platform, starting with the implementation of agentic AI in its financial planning and goal analysis features.

In an interview with Financial Planning, Dirk Pearson, chief operating officer, said the firm has been working behind the scenes to expand on the data ecosystem it hasalready built.

"What we've seen transpire over the last 12 to 24 months is going from generative AI to agentic AI,"he said. "Agentic is where we are all-in as a company, as far as tailoring our user experience to capitalize on that."

Kevin Hughes, president of financial planning, said building agentic AI-powered financial planning on top of what is already a unified user experience is the "missing link" in the firm's offering.

"Being able to embed AI into the experience to make an advisor's life a million times easier is great," he said.

Kwanti debuts some upgrades, teases others

Portfolio and analytics solution Kwanti used the occasion to announce several upgrades to its platform.

One of the features is Cash Flow Scenarios, which allows advisors to run four historical portfolio simulations: dividend withdrawal, fixed dollar withdrawal, percentage-based withdrawal and fixed dollar contribution. The second novel add-on is watchlist, which allows advisors to monitor securities and market movements in one place.

In an interview with Financial Planning, Christophe Gauthron, founder and CEO, said the firm had crafted these features based on user feedback.

"Especially these days, there's a lot more market movements, and this is another tool in the toolbox for advisors," he said.

Also at the conference, Kwanti teased coming AI-generated portfolio data insights. Gauthron said the company is still "testing the waters" before unleashing these AI-based advancements on users.

"We discovered that through some conversational interface, we can bring value," said Gauthron. "We can help speed up the prospect acquisition process and help with talking points. But, [we are being] cautious about our use of AI, because there are concerns about reliability, data confusion … and compliance. We're being cautious about that."

Patric Glassell, chief growth officer, said Kwanti wanted to make sure it was

taking a strategic approach by showing how AI can be useful in portfolio analytics.

"As opposed to just saying, 'Here, we have some AI and maybe you like it, maybe you don't," he said, "but not really being thoughtful about how an advisor and how their end clients could benefit from it."

The Oasis Group want you to know how AI-ready your firm is
Consultancy The Oasis Group announced its new Oasis AI Readiness Index, which uses 70 questions to create a benchmark for wealth management firms' use of the technology.

The assessment is split into two parts, the first covering governance and operational maturity, which measures policies, data, compliance, governance and readiness; and the second focused on technology capability tiering, which calculates how sophisticated the development has been so far.

In an interview with Financial Planning, John O'Connell, CEO and founder, said the assessment is more heavily weighted on the governance side.

"They can take the test to understand where they are in the readiness curve, but it also gives them a road map of how to get better," he said.